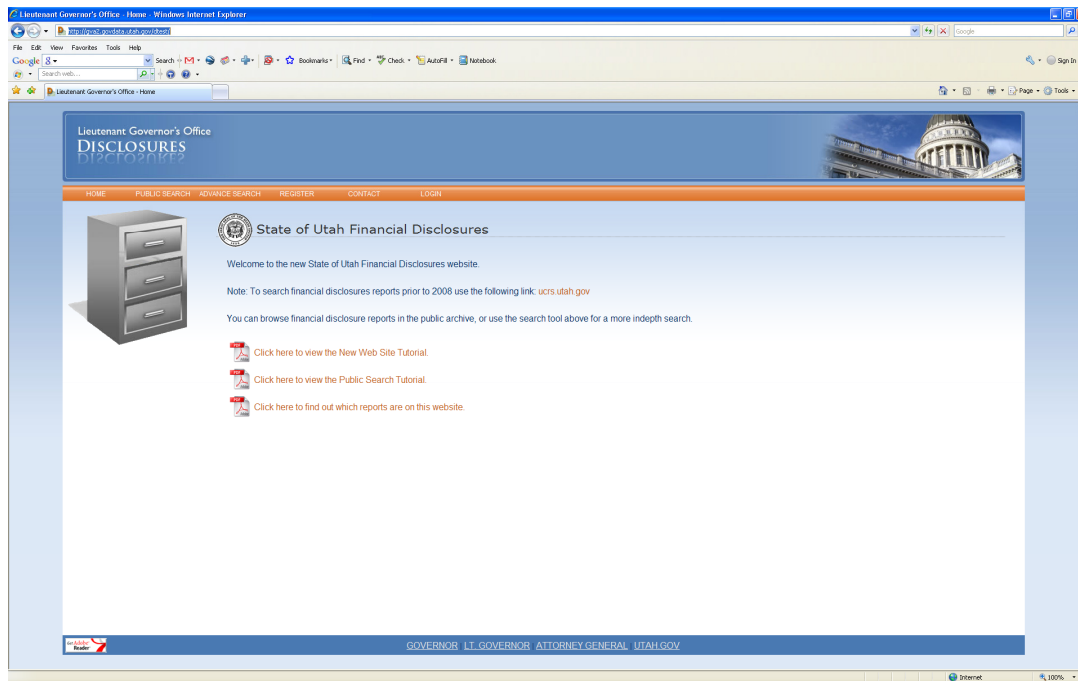


Candidates & Political Entities Tutorial

*****Please note that the disclosure system currently only works with Internet Explorer and Adobe 8 or higher.**

When opening the main screen will look like this:

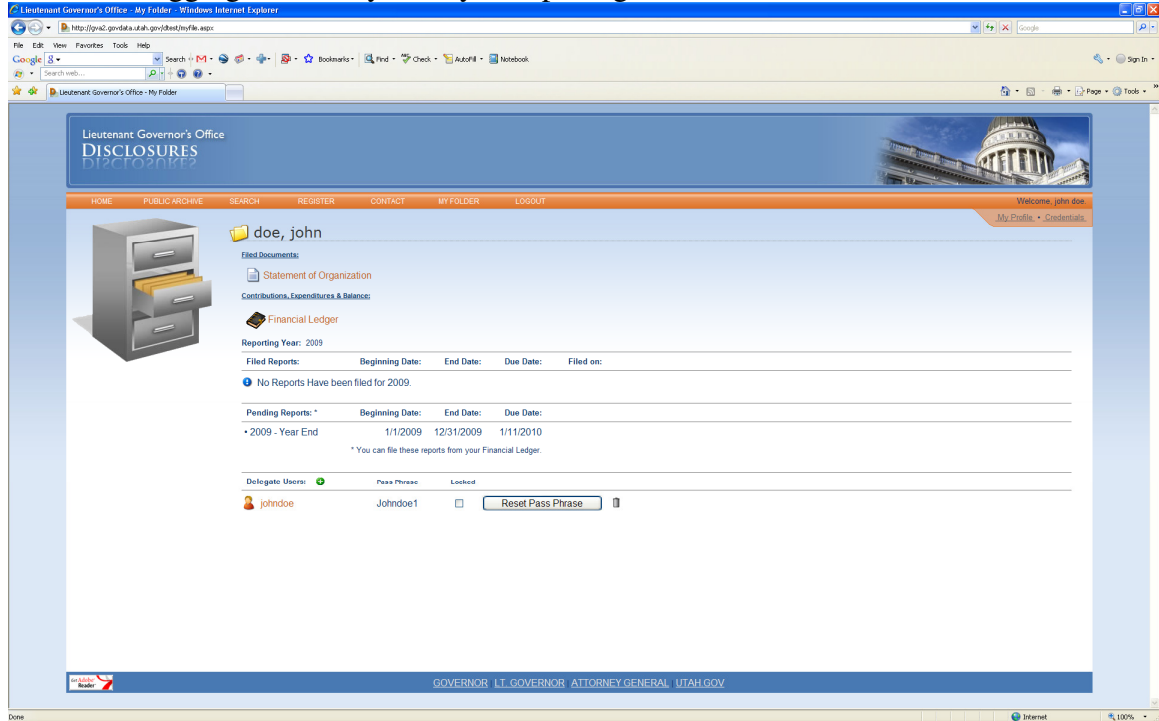


To log into the site, click the login button (highlighted in red below):



Your user name and password are the same as the last system. If you have forgotten your username or password, please call the Lieutenant Governor's office at 538-1041.

After first logging into the system, your opening screen will look like the one below:



There are a few places of importance on this screen:

- 1) Filed Reports: this will tell you what reports have been filed in the past. Any changes to these reports will show as amended. To view past years you must select the appropriate year.
- 2) Pending Reports: these are the reports still to be filled.

***Remember: PICs, PACs and Corporations only file when they have reached the minimum threshold. If you are a PIC, PAC or Corp. and have no expenditures or contributions to file during a reporting period, you do not have to file a report. Those reports will still show up, but do not worry; they did not have to file. **However, current candidates and office holders need to file each report regardless if there was any activity or not. If eliminated, then only a year-end report is required.**



To enter contributions and expenditures, click on the Financial Ledger link (highlighted in red below):

The screenshot shows a user interface for 'doe, john'. On the left is a filing cabinet icon. The main area has a header with navigation links: PUBLIC ARCHIVE, SEARCH, REGISTER, CONTACT, MY FOLDER. Below the header, there's a section for 'doe, john' with a folder icon. Under 'Filed Documents:', there's a link for 'Statement of Organization'. Below that, a red box highlights the 'Contributions, Expenditures & Balance:' section, which contains a 'Financial Ledger' link with a calculator icon and a 'Reporting Year: 2009' label. At the bottom, there's a table for 'Filed Reports:' with columns: Beginning Date, End Date, Due. A message states: 'No Reports Have been filed for 2009.'

It will bring up a screen that looks like the one below:

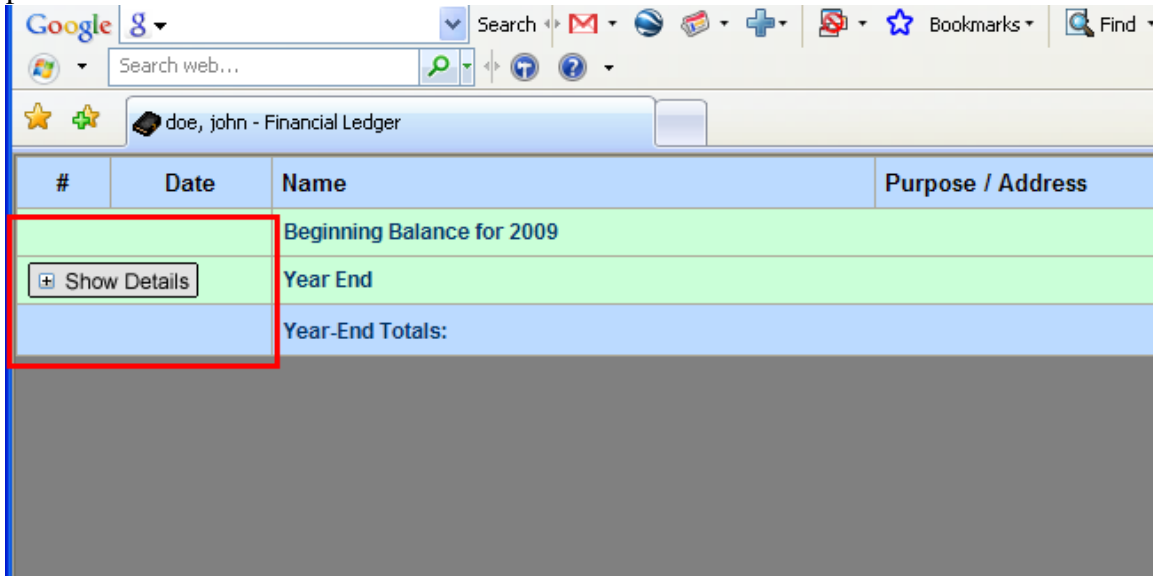
The screenshot shows a web browser window titled 'doe, john - Financial Ledger - Windows Internet Explorer'. The address bar shows a URL. The page displays a table with financial data for 2009. The table has columns: #, Date, Name, Purpose / Address, Add Contributions (+), Add Expenditures (-), Balance, In Kind, Loan, Amended, and Show Filters. The data rows are: Beginning Balance for 2009, Year End, and Year End Totals. A 'Show Details' link is visible next to the 'Year End' row. A 'File Report' button is also present.

| # | Date | Name | Purpose / Address | Add Contributions (+) | Add Expenditures (-) | Balance | In Kind | Loan | Amended | Show Filters |
|---|------|----------------------------|-------------------|-----------------------|----------------------|--------------|---------|------|---------|--------------|
| | | Beginning Balance for 2009 | | | | \$113,779.26 | | | | |
| | | Year End | | \$1.23 | \$0.00 | \$113,780.43 | | | | File Report |
| | | Year End Totals: | | \$1.23 | \$0.00 | \$113,780.43 | | | | |

Note that on the bottom left-hand side of the page are tabs which will let you select the appropriate year. It is extremely important that the correct year is selected. If not you will be entering information into the wrong year.



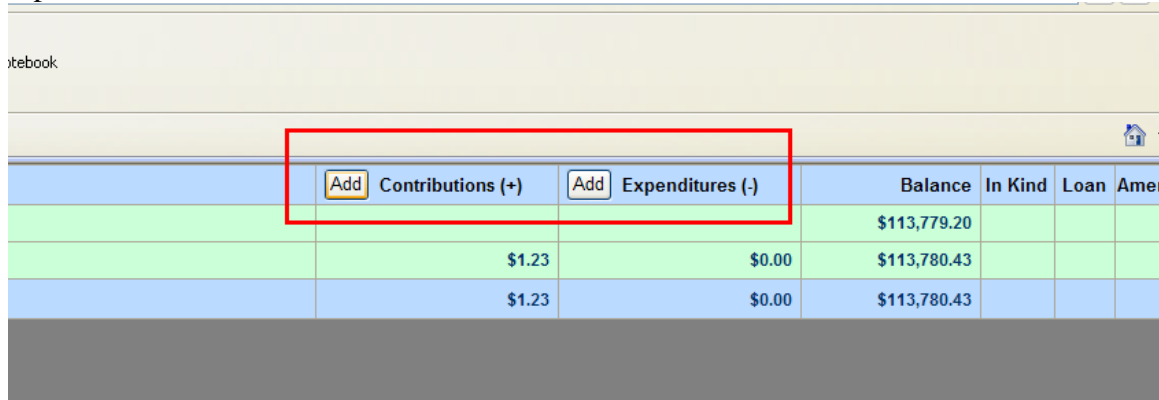
By clicking on the “show details” button you can expand the different reports and view past transactions:



When expanded it will look like this:

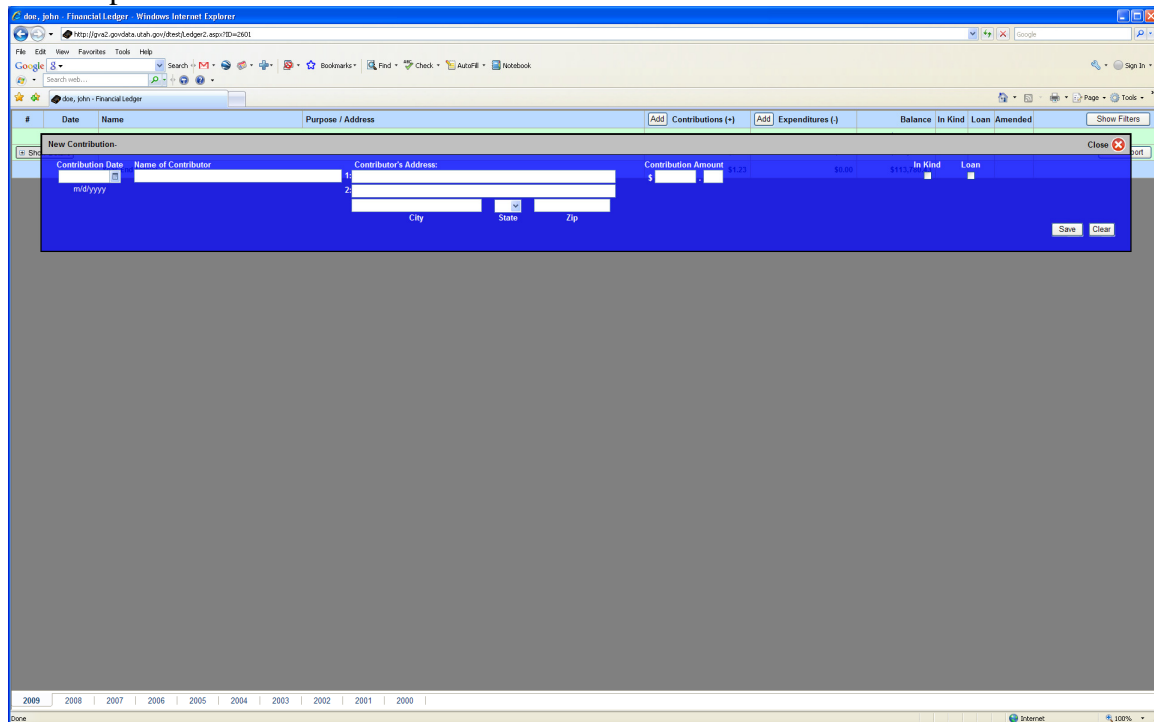
| # | Date | Name | Purpose / Address | Add | Contributions (+) | Add | Expenditures (-) | Balance | In Kind | Loan | Amended | Show Filters |
|----------------------------|-------|---------------------|--|-----|-------------------|------------|------------------|--------------|---------|------|---------|--------------|
| Beginning Balance for 2008 | | | | | | | | \$118,261.11 | | | | |
| Year End | | | | | | | | \$118,261.11 | | | | |
| Beginning Report Balance: | | | | | | | | \$118,261.11 | | | | |
| 1 | 1/9 | 1 | 1 | | | | \$1.10 | \$118,260.01 | | | | |
| 2 | 1/9 | john hancock | 1111 s 2222 w - west jordan, UT 84001 | | \$50.00 | | | \$118,310.01 | | | | |
| 3 | 1/9 | john hancock | copies | | | \$1.10 | | \$118,308.91 | | | | |
| 4 | 1/22 | Joe McElprang | 4038 - KEARNIS, UT 85118 | | \$55.00 | | | \$118,364.57 | | | | |
| 5 | 1/22 | Joe McElprang | 4038 - KEARNIS, UT 85118 | | \$5.00 | | | \$118,379.23 | | | | |
| 6 | 1/22 | Joe McElprang | 4038 - KEARNIS, UT 85118 | | \$5.00 | | | \$118,375.89 | | | | |
| 7 | 12/1 | john hancock | 1111 s 2222 w - west jordan, UT 84001 | | \$100.00 | | | \$118,475.89 | | | | |
| 8 | 12/1 | john hancock | * | | \$-100.10 | | | \$118,375.79 | | | | |
| 9 | 12/3 | copy store | copies | | | \$2,100.00 | | \$116,275.79 | | | | |
| 10 | 12/3 | copy store | copies | | | \$100.00 | | \$116,175.79 | | | | |
| 11 | 12/3 | copy store | copies | | | \$2,100.00 | | \$114,075.79 | | | | |
| 12 | 12/3 | copy store | copies | | | \$100.00 | | \$113,975.79 | | | | |
| 13 | 12/3 | john johnson | 1245 w anystreet - salt lake, UT 84111 | | \$300.00 | | | \$114,275.79 | | | | |
| 14 | 12/5 | the sign store | campaign signs | | | \$150.00 | | \$114,125.79 | | | | |
| 15 | 12/5 | the sign store | campaign signs | | | \$152.00 | | \$113,973.79 | | | | |
| 16 | 12/7 | Joe Test | 4038, d + sic, UT 84118 | | \$-100.24 | | | \$113,873.55 | | | | |
| 17 | 12/9 | john johnson | * | | \$-251.00 | | | \$113,622.55 | | | | |
| 18 | 12/9 | john johnson | 1245 w anystreet - salt lake, UT 84111 | | \$250.00 | | | \$113,872.55 | | | | |
| 19 | 12/10 | office supply depot | office supplies | | | \$150.00 | | \$113,722.55 | | | | |
| 20 | 12/11 | Joe | Test - 1, UT 1 | | \$1.10 | | | \$113,723.65 | | | | |
| Report Totals: | | | | | \$372.29 | | \$4,854.20 | \$113,779.20 | | | | |
| Year-End Totals: | | | | | \$372.29 | | \$4,854.20 | \$113,779.20 | | | | |

To enter transactions you must open the ledger for contributions or expenditures at the top of the screen:



| # | Date | Name | Purpose / Address | Add Contributions (+) | Add Expenditures (-) | Balance | In Kind | Loan | Amended |
|---|------|------|-------------------|-----------------------|----------------------|--------------|---------|------|---------|
| | | | | | | \$113,779.20 | | | |
| | | | | \$1.23 | \$0.00 | \$113,780.43 | | | |
| | | | | \$1.23 | \$0.00 | \$113,780.43 | | | |

When opened it will look like this:



New Contribution

Contribution Date: Name of Contributor: Contributor's Address:

Contribution Amount: In Kind: ☐ Loan: ☐

City: State: Zip:

Save Clear

***Please note that the reporting system will automatically file the contribution or expenditure in the appropriate report according to the date entered. For example, if a contribution was entered under the date of December it would fall under the year-end reporting period, and would thus be filed (automatically) in the year-end report. But if you were to file a contribution with the date of October 3rd, it would fall the general election reporting period and would thus be filed in that report. And because this report had previously been submitted, the contribution will show as “amended.”

Also note that the dollar and cents amounts are in different boxes. Make sure to separate the two, so as to not make the amount appear a larger than it was.

Enter contributions and expenditures individually. Contributions will show up in black, expenditures in red. Like this:

| # | Date | Name | Purpose / Address | Add Contributions (+) | Add Expenditures (-) | Balance | In Kind | Loan | Amended |
|----------------------------|-------|-------------|-------------------------------|-----------------------|----------------------|--------------|---------|------|---------|
| Beginning Balance for 2009 | | | | | | \$113,779.20 | | | |
| Year End | | | | | | \$113,779.20 | | | |
| 1 | 1/15 | willy wonka | candy | | \$151.23 | \$113,627.97 | | | |
| 2 | 3/3 | Joe Test 3 | Some Place • USA, UT 80888 | \$1.23 | | \$113,629.20 | | | |
| 3 | 12/13 | test mcgee | 1234 s 5678 w • sic: UT 84114 | \$100.00 | | \$113,729.20 | | | |
| Report Totals: | | | | \$101.23 | \$151.23 | \$113,729.20 | | | |
| Year-End Totals: | | | | \$101.23 | \$151.23 | \$113,729.20 | | | |

Editing and Deleting

Before a report is submitted you will have the option of editing or deleting certain transaction. To access this screen double click on a transaction line in the ledger. To the right of the transaction will appear the buttons “edit” and “delete”:

| Contributions (+) | Add | Expenditures (-) | Balance | In Kind | Loan | Amended | |
|---------------------------|-----|------------------|--------------|---------|------|---------|-------------|
| | | | \$113,779.20 | | | | |
| Beginning Report Balance: | | | \$113,779.20 | | | | File Report |
| | | \$151.23 | \$113,627.97 | | | | Edit Delete |
| \$150.12 | | | \$113,778.09 | | | | |
| \$1.23 | | | \$113,779.32 | | | | |
| \$100.00 | | | \$113,879.32 | | | | |
| \$251.35 | | \$151.23 | \$113,879.32 | | | | |
| \$251.35 | | \$151.23 | \$113,879.32 | | | | |

***Remember: this function is only available on transactions in reports that have not already been submitted. If a transaction has been submitted it will only have the option of amending or deleting.

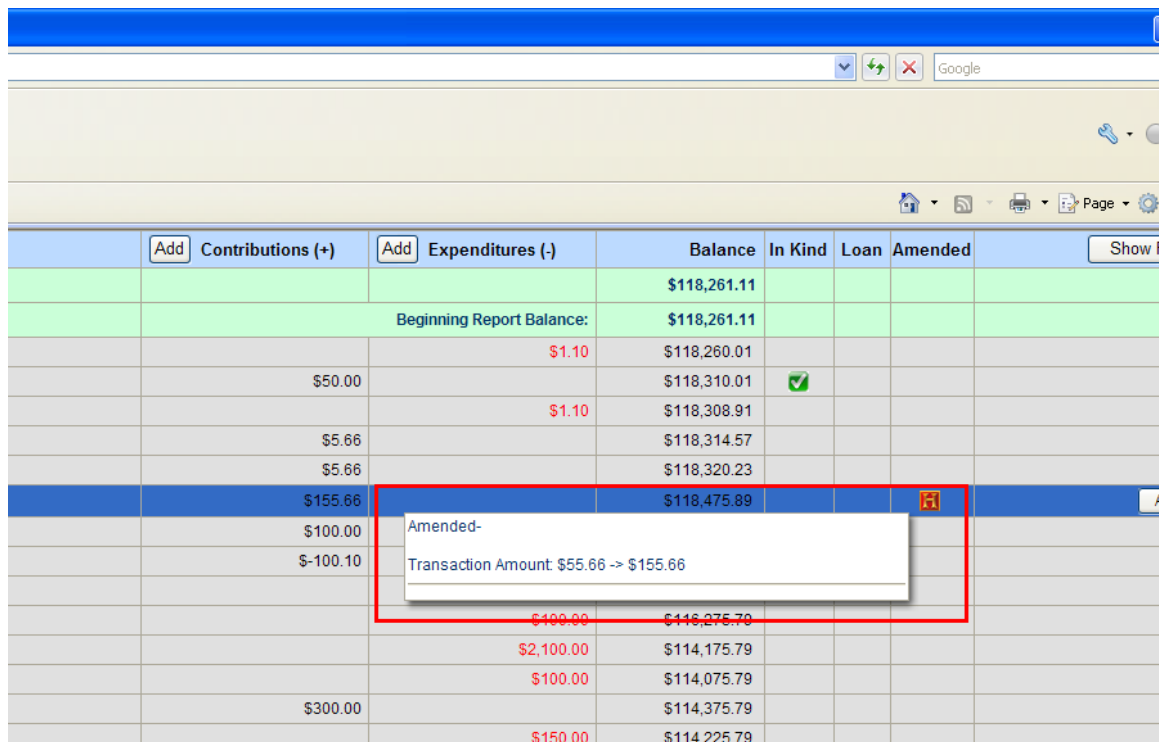
Amending and Deleting

Once a transaction has been submitted it can only be edited or deleted. To do this open the ledger and double click on the item you want to be amended or deleted. The buttons will appear to the far right of the transaction:



| Contributions (+) | Expenditures (-) | Balance | In Kind | Loan | Amended | |
|---------------------------|------------------|--------------|---------|------|---------|-------|
| | | \$118,261.11 | | | | |
| Beginning Report Balance: | | \$118,261.11 | | | | |
| | \$1.10 | \$118,260.01 | | | | |
| \$50.00 | | \$118,310.01 | ✓ | | | |
| | \$1.10 | \$118,308.91 | | | | |
| \$55.66 | | \$118,364.57 | | | | Amend |
| \$5.66 | | \$118,370.23 | | | | |
| \$5.66 | | \$118,375.89 | | | | |
| \$100.00 | | \$118,475.89 | | | | |
| \$-100.10 | | \$118,375.79 | | | | |
| | \$2,100.00 | \$116,275.79 | | | | |
| | \$100.00 | \$116,175.79 | | | | |
| | \$2,100.00 | \$114,075.79 | | | | |
| | \$100.00 | \$113,975.79 | | | | |
| \$300.00 | | \$114,275.79 | | | | |

After an item has been deleted it will show in the ledger as you have corrected. However, an icon will show next to the transaction. Holding the mouse cursor over the icon will reveal previous details of the transaction and what was changed and amended. Deleted items will show as “deleted” in the ledger, however previous details will be viewable.



| Add | Contributions (+) | Add | Expenditures (-) | Balance | In Kind | Loan | Amended | Show F |
|---------------------------|-------------------|-----|------------------|--------------|---------|------|----------|--------|
| | | | | \$118,261.11 | | | | |
| Beginning Report Balance: | | | | \$118,261.11 | | | | |
| | | | \$1.10 | \$118,260.01 | | | | |
| | \$50.00 | | | \$118,310.01 | ✓ | | | |
| | | | \$1.10 | \$118,308.91 | | | | |
| | \$5.66 | | | \$118,314.57 | | | | |
| | \$5.66 | | | \$118,320.23 | | | | |
| | \$155.66 | | | \$118,475.89 | | | Amended- | |
| | \$100.00 | | | | | | | |
| | \$-100.10 | | | | | | | |
| | | | \$400.00 | \$118,275.79 | | | | |
| | | | \$2,100.00 | \$114,175.79 | | | | |
| | | | \$100.00 | \$114,075.79 | | | | |
| | \$300.00 | | | \$114,375.79 | | | | |
| | | | \$150.00 | \$114,225.79 | | | | |

Once all the transactions for the year end report appear correct, you are now ready to file the report. This is done by clicking the “file report” button to the right of the ledger:

| Contributions (+) Add Expenditures (-) | | | | | | | Show Filters |
|--|----------|----------|--------------|--|--|--|--------------|
| | | | \$113,779.20 | | | | |
| Beginning Report Balance: | | | \$113,779.20 | | | | File Report |
| | \$151.23 | | \$113,627.97 | | | | |
| | \$1.23 | | \$113,629.20 | | | | |
| | \$100.00 | | \$113,729.20 | | | | |
| | \$101.23 | \$151.23 | \$113,729.20 | | | | |
| | \$101.23 | \$151.23 | \$113,729.20 | | | | |

You will get a confirmation screen before submitting:

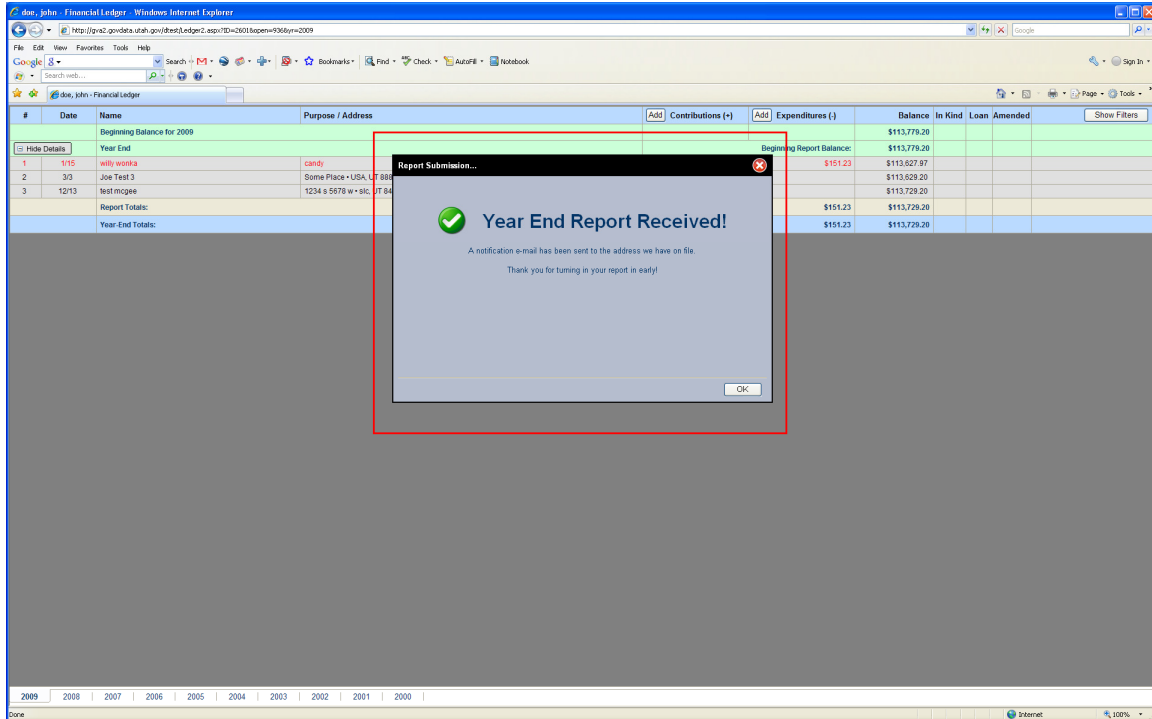
| # | Date | Name | Purpose / Address | Add | Contributions (+) | Add | Expenditures (-) | Balance | In Kind | Loan | Amended | Show Filters |
|------------------|-------|------------|-------------------------------|-----|-------------------|-----|------------------|--------------|---------|------|---------|--------------|
| | | | | | | | | \$113,779.20 | | | | |
| | | | | | | | | \$113,779.20 | | | | File Report |
| 1 | 1/15 | Year End | camp | | | | \$151.23 | \$113,627.97 | | | | |
| 2 | 3/3 | Joe Test 3 | Some Place • USA, UT 80000 | | \$1.23 | | | \$113,629.20 | | | | |
| 3 | 12/13 | test mcgpe | 1234 s 5678 w • sic, UT 84114 | | \$100.00 | | | \$113,729.20 | | | | |
| Report Totals: | | | | | \$101.23 | | \$151.23 | \$113,729.20 | | | | |
| Year End Totals: | | | | | \$101.23 | | \$151.23 | \$113,729.20 | | | | |

Windows Internet Explorer

You are about to file the Year End report. Click 'OK' to proceed.

OK Cancel

When you click “OK” you will receive confirmation that the report was submitted:



Once this is done you are finished and may exit out of the ledger by simply closing the window.


To see your submitted reports go back to your main profile screen and check under “filed reports”:




The report you just filed will have moved to the “filed reports” section.

To view past reports, or the one just filed, simply click on the link:

[Contributions, Expenditures & Balance:](#)


 **Financial Ledger**

Reporting Year: 2009

| Filed Reports: | Beginning Date: | End Date: | Due Date: | Filed on: |
|---|-----------------|------------|-----------|-----------|
|  2009 - Year End | 1/1/2009 | 12/31/2009 | 1/11/2010 | 3/4/2009 |

Pending Reports: *

 No pending reports.

Delegate Users:  Pass Phrase Locked

Clicking the link will bring up an adobe .pdf of the report:


http://gs2.gendata.utah.gov/dest/financialPDF.aspx?id=916816-2601 - Windows Internet Explorer

http://gs2.gendata.utah.gov/dest/financialPDF.aspx?id=916816-2601

File Edit Go To Favorites Help Search M Check AutoFill Notebook

http://gs2.gendata.utah.gov/dest/financialPDF.aspx

1 / 4 100% Print



**Report of Contributions and Expenditures
For Legislative Candidates and Officeholders**
(Utah Code Section 20A-11)

| | | | |
|-----------------------------------|------------------------|----------------|-----------------|
| Name of Candidate or Officeholder | | Phone Number | |
| john doe | | 801-555-5555 | |
| Street Address | Suite/Apartment/PO Box | City | State Zip |
| 1234 s anystreet | | salt lake city | UT 84111 |
| Office | District Number | County | Political Party |
| Lieutenant Governor | | | |

Type of Report
(Check the appropriate box)

INTERIM REPORTS:

- ☐ Seven days preceding Party Convention (Required by all candidates)
- ☐ Seven days preceding Primary Election (Required by all candidates)
- ☐ August 1-14 (Required by all candidates)
- ☐ Seven days preceding a General Election (Required by all candidates)

YEAR-END REPORT

- ☒ January 10th of every year

FINAL REPORT:

- ☐ Final Report (Required by all candidates and officeholders as soon as they close campaign accounts)

Is this report an amendment?

- ☐ Yes
- ☒ No

Report Verification

I, _____
Name of Candidate
affirm that this Report of Contributions and Expenditures is
true, accurate and correct to the best of my knowledge.

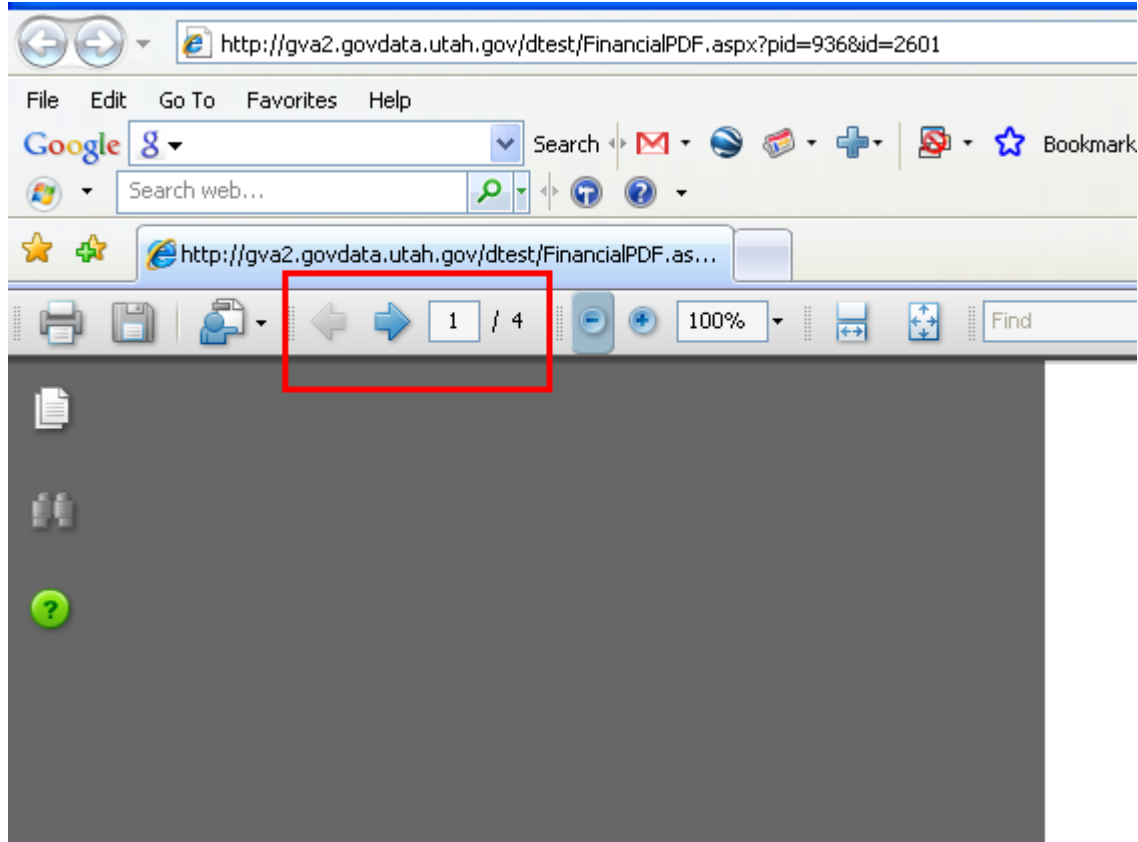
Signature of Candidate

LEGISLATIVE CANDIDATE

Done

Unknown Zone

To go through the individual pages of a report use the blue arrows in the top, left of the screen:



Here are the reports you will find in www.disclosures.utah.gov:

Candidate/Officeholder

www.disclosures.utah.gov contains all 2008 candidates/officeholders' reports, if they had activity in the 2008 election cycle.

Senators and State School Board Members elected in 2006 had all of their election cycle reports from 2006, 2007, and 2008 transferred to www.disclosures.utah.gov.

PIC/PAC/Corporation

www.disclosures.utah.gov contains all reports and transactions on or after 1/1/2008.

Political Party

www.disclosures.utah.gov contains all reports and transactions on or after 1/1/2007.

If you encounter any problems, please call the Lieutenant Governor's office at 538-1041.